DOCUMENT RESUME

ED 402 501 CE 073 194

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TITLE The Worklife Methodology. A Framework for Career Transition Making.
INSTITUTION Centre for Worklife Counselling, Sydney (Australia).
PUB DATE 96
NOTE 7p.
PUB TYPE Viewpoints (Opinion/Position Papers, Essays, etc.) (120)

EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS Adults; Career Change; Career Choice; *Career Counseling; *Career Development; Career Planning; Evaluation Methods; *Evaluation Utilization; Foreign Countries; Models; Occupational Information; Resources; Self Actualization; *Self Concept Measures; *Self Evaluation (Individuals); Vocational Interests

ABSTRACT

The Worklife Methodology is a process for helping people determine their next career and life management actions. It includes three components: the Stevens' Model of Career Development; Structured Analysis through Career Analysis Levels 1, 2, or 3; and the Three-Dimensional Analysis Process. The Stevens' Model of Career Development is a formula for taking people through the whole journey of self-exploration and evaluation of their career options and on to the successful implementation of their choice, given their employment environment or labor market opportunities and restrictions. The model shows the sequence in which a person should proceed to resolve worklife direction problems. The model has six stages, with specified activities within each stage: self-assessment, interpreting data, opportunity awareness, decision learning, transition training, and transition accomplished. Structured Analysis provides three levels of self-search through the use of an equation that helps to order information in a coherent way that will lead to improved understanding and comfort in choosing a particular career action. The third component of the Worklife Methodology, the Three-dimensional (3-D) Analysis process includes a focus on job content, employment environment type, and lifestyle preferences. The Worklife Methodology seeks to help a person define his or her real self. It is now widely used to assist adults in personnel review situations in Australia and New Zealand, and it is also being used in other countries for helping people through career transitions, employment problems, and unemployment. (KC)

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# The Worklife Methodology

## A Framework for Career Transition Making

*by Paul Stevens, Founder / Director, The Worklife Network*

The Worklife Methodology for helping people determine their next career and life management action step comprises, in its most basic form:

- The Stevens' Model of Career Development
- Structured Analysis through Career Analysis Levels 1, 2 or 3
- The Three-Dimensional Analysis Process

### The Stevens' Model of Career Development (see Figure 1)

It is inevitable that, as time passes, researchers or practitioners in career and worklife counselling evolve new theories and models or refine those already well known. The Stevens' Model of Career Development is one of them. I devised an early version of the Model in 1981 when a book I had written, *Stop Postponing the Rest of Your Life*, was first published. Since that date, considerable refinements and extensions of my Model have been made and, concurrent with this evolution, new editions of *Stop Postponing the Rest of Your Life* have been published. The most recent is the 10th Anniversary edition published in 1991 (ISBN 1 875134 10 7) and reissued in 1996 with a new cover depicting a Swedish artist's representation of the theme of the book.

The Model is a formula for taking people through the whole journey of self-exploration and evaluation of their career options and on through to the successful implementation of their choice, given their employment environment or labour market opportunities and restrictions.

It is foolish to reinvent the wheel or ignore the wide variety of wheels that already exist. So the Model I have evolved incorporates the hard work of previous researchers and career development practitioners and their output of career decision-making approaches and counselling processes. But, like an artisan, I have added to and refined the wheels. I have rejected what has not worked to my standards of career support provision and discovered some nuts and bolts not previously invented. In particular, what I did observe was that many models designed to help a person neglected the difficulties of (i) making a decision between appealing options and (ii) how to implement a career action determination once it had been carefully and thoroughly identified. Hence my Model includes the steps of Decision Learning and Transition Training. I also found that several models researched and designed within an academic environment failed my tests when applied to the situations of my clients in the reality of the world of work. While originating in adult career development theory, my Model has an essentially practical approach which incorporates most, if not all, of the aspects of a person's work and way of life in their career and enrichment transition making.

The Stevens' Model illustrated in Figure 1 shows the sequence in which a person should proceed to resolve worklife direction problems. The Model has six stages. Within each stage there are specified activities. The activities the individual undertakes can be with or without the support of a career counsellor or mentor. It is necessary to proceed through each of these discrete stages in the sequence described. To change this sequence could jeopardise the validity and qualitative success of the outcomes.

*Worklife has been providing in-company career and life planning training since 1983. In the past year nearly 100 workshops have been facilitated. Career development support strategies have been designed in partnership with more than 22 organisations since 1994 for their employees and executive management objectives.*



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**Figure 1 — The Stevens' Model of Career Development**

**Stage One: Self-Assessment**

Clarify issues and concerns — Assemble an information base through structured analysis — Review current job effectiveness — Check employment experiences — Abilities — Interests — Values — Primary wants — Employment environment preferences — Lifestyle considerations

**Stage Two: Interpreting Data**

Analysis — Transferable skills identification — Career requirements developed — Resolve ambiguities — Lifestyle integration — Monetary needs and considerations — Barriers to success — Identify perceived and real constraints

**Stage Three: Opportunity Awareness**

Collect information — Research — Organisation information gathering — Reality testing — Cultivate a network — Mentoring — Evaluate results — Select career action(s) options

**Stage Four: Decision Learning**

Evaluate career action options — Trade-offs — Decide on goals — Prepare Career Action Step Statement

**Stage Five: Transition Training**

Schedule career transition actions — Rehearse for negotiations — Develop strategies for success — Check career action preparation — Prepare requests for approval — Audit career transition progress

**Stage Six: Transition Accomplished**

Review of completed career action steps — Assessment of well-being

The Stevens' Model of Career Development is essentially a developmental based concept, not a matching process. Users are not led to a list of occupations on which to base their career action decisions. They are led to initiate career exploration (Opportunity Awareness) using the conclusions from their self-assessment phase and then apply detective, communication and research skills. The Model requires the user to be self-sufficient, but does not preclude the need for—in fact, encourages—talking to and being helped by others during the self-search problem-solving and decision-making journey.

Career assessment instruments for self-assessment by the client and structured self-search and self-determination designs have been developed for each stage of the Model.

The use of the Model proceeds more comfortably if using a structured framework into which lots of data can be fitted by the client and viewed from different perspectives by both the client and the skilled helper—the career counsellor or mentor.

### Structured Analysis (see Figure 2)

It is useful to employ an equation to provide a structure for the client's self-review, so that the client's thinking is given a distinct focus and sense can be made of the complexities of their psychological make-up and the individuality of their personal needs. The use of an equation helps them to not only identify what is important to them but also determine how important each of these aspects is in their career determinations.

The Worklife Methodology incorporates the option of three levels of self-search and planning detail by the client. Level 1 is expressed as an equation:

**M (PW) + V + I + PS - PC = Career Action Step Decision**

My experience is that the majority of clients can evolve satisfactory outcomes for their career planning by using this Level 1 equation. Yet, for many, a greater depth of analysis and data gathering about self and their employment situation is needed and often wanted. Hence Levels 2 and 3.

The equation helps people to explore themselves and to incorporate this information in a coherent way which will lead to improved understanding and comfort in choosing a particular career action. The formula comprises M for Motives, V for Val-

ues, I for Interests, PS for Preferred Skills or Competencies, PC for Perceived Constraints.

- M = Motivation—is about establishing what our current primary wants are at this stage of our life and personal circumstances.

- V = Values—helps focus on what we value most consistently. Awareness of our values is critical so that we avoid affront or disappointment. Values are a critical factor in our quest for personal fulfilment.

- I = Interests assessment which identifies the essential themes that need to be incorporated in our work for us to have a chance at deriving work satisfaction.

- PS = the talents, skills, competencies we prefer to use in our work, i.e. our specific set of motivated abilities which may or may not conform with our aptitudes.

- PC = Perceived Constraints. These feature in everyone's lives. Listing them is important. The individual items can then be examined to determine the degree to which each constraint exists and a conclusion can be reached as to whether it really is an obstacle or can be circumnavigated by adopting a particular strategy or attitude or acquiring more accurate information.

Constraints are also personal choices about what the person wants to include in their framework of decision making, e.g. part-time work hours, child- or elder-care obligations and desires. In other words, the boundaries of our personal decision making.

**Figure 2 — Career Analysis Levels**

Level 1 : M (PW) + V + I + PS - PC

Level 2 : Structured Learning Workbooks

- *My Career, My Life, Myself* (Stevens, Worklife)
- *The PIE Method for Career Success* (Porot, JIST Inc.)
- *How to Create a Picture of Your Ideal Job* (Bolles, 10 Speed)

Level 3 : Life Management Review

- *Stop Postponing the Rest of Your Life* (Stevens, Worklife)
- *What Color is Your Parachute?* (Bolles, 10 Speed)
- *Life Skills* (Leider, Pfeiffer / Prentice-Hall)

Clients assemble this database: to analyse their particular situation with the assistance of non-threatening, non-psychometric career assessment instruments; to unravel confusion; and to put order into their thoughts and conclusions. They can then plan their exploration and carry out action steps to alter a worklife situation which is proving unsatisfactory or inhibiting fulfilment, or change from unemployment to being appropriately employed where what we do is matched with our uniqueness.

Many clients require a larger database before planning can take place and they can make decisions. Hence, the Worklife Methodology for Levels 2 and 3 utilises publications designed as workbooks with questionnaires and inventories requiring many hours of use and data collation and contemplation. These provide a structure for clients' thinking and acting. The myriad of facts and experiences of the lives they have led need to be segmented. Clues may be buried in the depths of their memory, even in their subconscious. A structure may prise them out into the open for considered review and for evaluation of whether they should be incorporated in their career planning and subsequent career actions.

An example of a Level 3 workbook is *Stop Postponing the Rest of Your Life* which contains 50 analysis exercises covering each of the six stages of Stevens' Model of Career Development. The exercises stimulate self-exploration, learning by doing, self-discovery options awareness and personal resolutions. Clear directions are provided for recording responses, information, insights, consultations with others, reflections, action steps, reality testing, checklists and schedule making.

While the most desirable situation is for the individual to complete all of the exercises, some career development and life management issues can be satisfactorily resolved by using a selection of the exercises from each Stage. It follows that omitting a Stage by avoiding all exercises in that Stage jeopardises the success of outcomes.

The structured analysis exercises emphasise learning through stimulated self-initiated exploration. People can undertake them alone—in privacy—as 'home-

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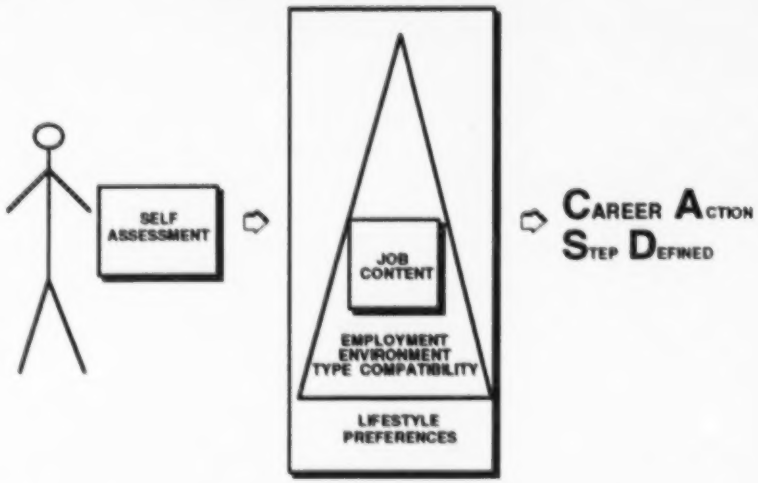
work'. They can proceed at their own pace through their career and life management review journey. Alternatively, a trainer can select some exercises to be undertaken during attendance at a workshop, or a counsellor can do likewise during a series of counselling / career coaching helping meetings.

Some people experience difficulty with self-search exercises of this nature. They may want a speedy resolution to their problem, a quick fix. Some will not experiment adequately with the exercises in *Stop Postponing the Rest of Your Life* before concluding that they do not need them or that this method is unappealing. Reluctance to commit personal thoughts in writing will deter some. Concerns about sharing personal data with a counsellor or trainer may cause them to fail to extend their own learning boundaries. Some need to be driven by a recent setback in their career or personal life to find the courage and make the effort required to complete the exercises which often seem confronting in nature.

The important factor is that reading and thinking about career and life management rarely suffices when considering all that needs to be done to make significant changes in behaviour, attitude and degree of inner well-being about our worklife. A person who actively proceeds through the exercises in *Stop Postponing the Rest of Your Life* is learning the value of feeling more in charge of their career and life management direction and enhancing the belief—and thereby their self-confidence—that their diligence will bring the results they want and deserve for undertaking this effort.

**Figure 3 — Three-Dimensional Analysis**




### Three-Dimensional Analysis (see Figure 3)

The third component of the Worklife Methodology is the Three-Dimensional (3-D) Analysis process. Identifying an appropriate career direction is more complex than simply analysing skills and finding out where they best fit in the world of work. This analysis requires a 3-D approach focussing on each of the following: Job Content, Employment Environment Type and Lifestyle Preferences. Once the client has assembled their data and determined their requirements for each of the three dimensions, the task of integrating each into a coherent career direction is addressed. This 3-D approach within the Worklife Methodology extends the traditional person-job content only matching procedures and thereby redefines career planning as life management planning.

### Summary

The Worklife Methodology seeks to help the client define their real self. It is focused more on the internal characteristics of the person than the external. The client's data gathering is guided to each of the three dimensions. The client must link their internal data (their inner self) to their view of their external world (the outer self) before a career self-help action can be taken. The methodology demands client self-responsibility, i.e. the need to recognise that the person, not others, is accountable for their own employability and worklife satisfaction.

It is a person's internal and external characteristics which cause them to be satisfied or dissatisfied in their employment choice. The external characteristics are: occupational title, job title provided by an employer (may differ to the first), remuneration, prestige, status, location, commuting to and from workplace, degree of influence with others, evidence of career path(s) traversed to date. The internal characteristics are: self-concept, goals, aspirations, values, feelings, satisfaction, anger, disappointment, philosophy of life, view of age and health, the feeling of being in control of one's life direction.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Each of us has an individual world created around our view of self. This inward view of ourselves gives us our personal perspective on the world around us. The events occurring in our outside world, whether work, family or other happenings, are interpreted by the current state of our inner world or view of self. Some call this inner world our self-concept. Just as events are occurring outside us—a continual series of changes—so too our inner world is changing. Our view of these external events, therefore, changes as our sense of self changes and we modify our inward view as these changes take place, comfortably or uncomfortably.

Our career—even broader, our life—is the outcome of our inner self's responses to the interaction between these external and internal forces. The choices, decisions and emotional investments we make in work, family and other areas shape the overall nature of our lives and feelings. Because neither we nor the environment stays still, changes in both influence, alter and sometimes disturb our viewpoint. Both major and minor changes can disrupt the balance. A new accommodation needs to be made. A redefinition of self and the external world is required in order to restore comfort to our lives and a sureness that the actions we take really are right for us. New assessments, an expanded awareness of our strengths, skills, preferences and value system need to be made. Hence, our career is a sequence of alternating stable and transitional phases. Once a client has been facilitated through the Worklife Methodology, the person is equipped with a meaningful life skill and is often capable of repeating the process alone when the need recurs in their life's journey.

**Figure 4 — Employer's Support Services Guide**

**Stage One: Self-Assessment**

Provide resources for self-understanding — Self-help workbooks —Assessment instruments — Analysis of development needs — Skill gap assessment — Career planning workshop

**Stage Two: Interpreting Data**

Provide forum for confidential discussion — Counsellor help — Check for realistic appraisal of potential — Input data into employee skill inventory

**Stage Three: Opportunity Awareness**

Link person with appropriate resources and people — Provide career information resources — Career path and mobility options — Provide job content skill/competency definitions — Job vacancy, job rotation, secondment opportunity bulletins

**Stage Four: Decision Learning**

Training in decision-making methods — Communication of realities of options — Provision of mentor assistance — Access to third party external counsellor — Documentation of career action resolution

**Stage Five: Transition Training**

Provide support to realise goal acceptable to organisation and employee — Career coaching from manager — Interview training — Résumé writing help

**Stage Six: Transition Accomplished**

Follow up by HRM staff on outcomes, i.e. benefits for employer, benefits for employee — Schedule career progress review — Reinforce manager's role in career support

## Use of Methodology

The Worklife Methodology is now widely used to assist adults in personal review situations across Australia and New Zealand. It is also the foundation for pathfinding help to people in Nordic countries through our associates, New Start AB. Career counsellors are using it for people in such diverse needs as: orders of religious women (nuns); military to civilian career changers; redundant personnel (outplacement); work injured (rehabilitation); women returning to the workforce; 'hard-core' unemployed; athletes terminating their sporting careers; those who have to or want to redeploy where they work; employers wanting a career self-reliant workforce (see Figure 4); migrants needing new directions; the midlife confused;

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third-age transition makers; academe in their training of career counsellors; post-retirement personal fulfilment seekers.

Worklife Pty Ltd continues to research, design and publish new 'tools' providing counsellors and trainers working with my Model with new designs and refinements to help the progress of those they are assisting at each stage of the problem-solving process and to audit their clients' readiness to proceed to the next stage.

* * *

The Worklife Methodology is described by me in greater detail within *A Passion for Work: Our Lifelong Affair* published in 1993 (ISBN 1 875134 20 4).

# WORKLIFE™

## — An Explanation

The term 'Worklife' was chosen to reflect our continuing work in research, counselling, training and publishing material which relates to improving people's enjoyment from their employment activities and other aspects of their lives.

We do not accept the traditional view of career support—that is, to help people acquire satisfaction only from their working hours. We consider that occupational satisfaction can only occur when a person's total needs are included in the assessment of what is lacking and what needs to be done to increase inner well-being, improved relationships with others, and effective performance both at work and non-work activities. 'Life' in Worklife means our focus is on the total person. 'Work' relates to the roles in which the person is involved (employee, student, homecarer and citizen) and their environments (workplace, educational institution, home, community).

Ours is a holistic approach—in our counselling and career training workshops we consider all features of a person at the same time as maintaining respect for personal privacy by use of non-threatening inquiries into thoughts and circumstances.

## The WORKLIFE™ Network

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